Date of receipt:

Teachers' Pensions

Short-service annuity

Before completing this form, please read the accompanying notes.
Please complete this form using black ink and in BLOCK CAPITALS.

Part A: To be completed by the applicant in all cases.

Section 1: Personal details

1. **Teacher's reference number** (example 99/99999)

   /

2. **Surname** (one character per box)

3. **Former surname** (if any)

4. **First name**

5. **Title** (please tick, or state if other)

   Mr Mrs Miss Ms Other

6. **Date of birth**

   D D M M Y Y Y Y

7. **National Insurance number**

8. **Contact address**

   Postcode

9. **Home telephone number** (inc. STD code)

10. **Mobile telephone number**

11. **Personal email address**

Section 2: Payment details - Please note that we will only be able to make payments to an account or joint account that is in your name.

12. **Account number**

13. **Branch sort code**

    - -

14. **Bank / Building society reference number**

15. **Building Society roll number**

16. **Name of account holder**

    Please enter the name as it appears on your card

Full name and address of UK bank

Postcode

If you would like to use an overseas bank account please also complete the questions on the following page.

Part A: To be completed by the applicant in all cases. (continued)

Section 2: Payment details (continued)

17. IBAN/Bank and account codes

18. BIC/Swift code

Full name and address of overseas bank

Postcode

Please note that payments made to a non UK account will only be paid in the bank's local currency. If you choose to have your pension paid into an overseas bank account, a monthly administration fee of £1 will be applied

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:
Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk

Part A: To be completed by the applicant in all cases. (continued)

Section 3: Lifetime allowance

Although the Lifetime Allowance charge was removed with effect from 6 April 2023, and the government has made clear its intention to abolish the Lifetime Allowance from the 2024/25 tax year, pension schemes must continue to operate Lifetime Allowance checks when paying benefits.

Therefore, if the aggregate of all your annual pension(s) in payment and any going into payment including the Teachers' Pension Scheme exceeds/will exceed £35,000 per annum in total then you **must** complete the Lifetime Allowance Charge Assessment form. Failure to do so may result in delays in processing your pension award.

Please tick the relevant box based on whether you are affected or not.

Yes ☐ No ☐

Section 5: Declaration

- I acknowledge that because I do not qualify for retirement benefits, or further retirement benefits, I apply for an annuity under the Teachers' Pensions Regulations.
- I agree to inform Teachers' Pensions of any change to my retirement date or to any other details I have provided on this form.
- I agree to inform Teachers' Pensions if I begin employment in teaching within the British Islands at any time during my retirement.
- I am enclosing a copy of my passport (if applicable, see note 4).
- I understand that any overpayment of benefits will be recovered.
- I understand that if my existing benefits and benefits from the Teachers' Pension Scheme at retirement exceed the Lifetime Allowance at retirement, and I have no transitional protection certificate, the Lifetime Allowance charge will be paid and my benefits reduced.
- I confirm that I am not in breach of the HMRC recycling rules.
- All the information I have given on this form is true to the best of my knowledge and belief.
- I acknowledge that in the event I do not qualify for retirement benefits, or further retirement benefits, I apply for an annuity payment under the Teachers' Pensions Regulations Annuity payments are calculated as follows: TOTAL CONTRIBUTIONS PAID BY MEMBER + INTEREST/ AGE RELATED FACTOR.
- I acknowledge it is not possible to convert an annuity into a lump Sum. The annuity does not revert to a dependant on death and will increase inline with the Pensions Increase Act 1971.
- I acknowledge that if I'm a re-employed pensioner, the annuity will be added to my normal monthly payment.
- I understand further Information including factors can be found at www. teacherspensions.co.uk/members/planning-retirement

Signature

Date

D D M M Y Y Y Y

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:
Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk

Part B: To be completed by the employer and returned without delay.

Section 1: Employment Details

1. Establishment number

/

2. Reference number

/

3. Date of birth

D D M M Y Y Y Y

Verified?

Yes No

4. Is teacher currently suspended from duty?

Yes No If yes, please provide details and attach to form.

Employment details up to last day of pensionable employment:

Please include details for the previous Scheme year (01 April - 05 April, 06 April - 31 March) and the current year, up to the last day of pensionable employment.
Note: For annual allowance calculations Teachers' Pensions need to know the pensionable earnings in each tax year, hence the requirement to provide service and pensionable earnings details for 01 April - 05 April seperately.
Please DO NOT submit lines with a start and end date spanning 31 March; this will result in delays in processing the application.
When splitting the service year (e.g 01 April - 05 April, 06 April - 30 April), please ensure that the actual part-time salary paid is the pensionable earnings in the period, not the annual part-time earnings.
Please use the example table below as a reference to complete the table overleaf.

Full time/ Part time Indicator (FT, PT, PTIC)	LA No.	Estab. No.	Start date (dd/mm/yy)	End date (dd/mm/yy)	Role Identifier	Full-time annual salary rate (£)	Part-time earnings (£)	Days excluded	Additional Pensionable payments (£)	Overtime (Gross Amount in £'s)	Withdrawal Indicator (W)
FT	123	4567	01/04/19	05/04/19	1/1	27,000					
FT	123	4567	06/04/19	30/04/19	1/1	27,000					W
PTR	123	4567	01/05/19	31/05/19	2/1	25,000	1,000				
PTR	123	4567	01/06/19	30/06/19	2/1	25,000		30		50	W
PTIC	123	4567	01/07/19	31/07/19	3/1	25,000	500		100		

EXAMPLE

Full-time/Part-time Indicator - Full-time (FT), Part-time Regular (PTR) and Part-time Irregular (PTIC)
Start date and End date - both dates should be in the same calendar month
Role Identifier - this should be provided by MCR employers only and contain a forward slash separating the contract from the role (for example 1/1)
Part-time Earnings - should be the actual part-time earnings for the period stated in the service line
Days Excluded - should only be provided if the member has not worked in the period stated
Additional Pensionable Payments - include Bonus and Out of School Learning Activity (OSLA) payment
Overtime - paid in the service period stated
Withdrawn - a 'W' should be provided where the member has left the Role Identifier contract provided.

Part B: To be completed by the employer and returned without delay.

Full time/ Part time Indicator (FT, PT, PTIC)	LA No.	Estab. No.	Start date (dd/mm/yy)	End date (dd/mm/yy)	Role Identifier	Full-time annual salary rate (£)	Part-time earnings (£)	Days excluded	Additional Pensionable payments (£)	Overtime (Gross Amount in £'s)	Withdrawal Indicator (W)

Part B: To be completed by the employer and returned without delay.

Notes: The certificate must be signed by a responsible officer of the **Local Authority** in respect of all maintained schools, including both foundation and voluntary aided schools. In the case of other institutions, the certificate must be signed by a responsible officer or chairperson of the governing body. This cannot be a member of the teaching staff.

In order to sign the form on Adobe Acrobat you'll need a digital signature. If you haven't got one, creating one is simple:

1. Click on the signature box
2. Select 'Configure your Digital ID' button
3. Select 'Create a new Digital ID'
4. Save it to the Windows Certificate Store
5. Enter your name and email address and click 'save'
6. Then select your Digital ID.

This will create a signature block and time stamp and directs you to save the document.

Certificate:

Signed

Position

Name of contact for admin purposes (in capital letters)

Date

D D M M Y Y Y Y

Name of officer (in capital letters)

Telephone number (inc. STD code and extn.)

Email address

Establishment address

Postcode

Fax number

Please read the accompanying notes before completing this form.

Notes

1. If you are a re-employed pensioner, you should only complete this annuity application form if you do not intend to undertake further employment which would entitle you to a further award of pension benefits.

2. It is not possible to convert an annuity into a lump sum. The annuity does not revert to a dependant on death and will increase in line with the Pensions (Increase) Act 1971.

3. Lifetime Allowance. The Finance Act 2004 introduced a single tax regime that applies to all UK tax privileged pensions from 6 April 2006. This new regime introduced a 'Lifetime Allowance', which is the total allowable value of benefits (both pension and lump sum) from all registered pension schemes. This excludes pensions payable from the state.

Please visit the updates section of the Teachers' Pensions website for details of the latest Lifetime allowance level.

www.teacherspensions.co.uk/updates

To see whether you are affected, the following formula should be applied to your benefits:

$$\frac{(\text{Annual Pension} \times 20) + \text{Lump Sum}}{\text{Lifetime allowance}} \times 100 = \text{LTA\%}$$

If the percentage exceeds 100% you'll be liable for the LTA charge unless you have a transitional protection certificate.

If your benefits from all registered pension schemes currently in payment (and your TPS annuity which is coming into payment is less than £35,000 per annum) please tick the 'No' box. If your benefits in payment and about to come into payment on the same date as your teacher's pension exceeds £35,000 per annum, please tick the 'Yes' box. A further form will then be forwarded to you to complete. If an LTA charge is due, then TP will account for this by reducing your benefits.

4. If you have been out of service for more than 1 year, a copy of your passport must be enclosed when returning this application form.

5. If you are a re-employed pensioner, the annuity will be added into your normal monthly pension.

6. If you made an additional pension election and have not qualified for pension benefits the contributions towards the additional pension, including any lump sum contribution, will form part of the annuity.

In order to sign the form on Adobe Acrobat you'll need a digital signature. If you haven't got one, creating one is simple:

1. Click on the signature box
2. Select 'Configure your Digital ID' button
3. Select 'Create a new Digital ID'
4. Save it to the Windows Certificate Store
5. Enter your name and email address and click 'save'
6. Then select your Digital ID.

This will create a signature block and time stamp and directs you to save the document.

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:
Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk